

TECHNOLOGICAL NEEDS NEW and EXISTING PROJECT DESCRIPTION

County: San Diego

Select one:

☒ New☐ ExistingProject Number/Name: SD-2 Consumer/Family Empowerment ProjectDate: 2/18/2011**TECHNOLOGICAL NEEDS NEW PROJECT****Check at least one box from each group that describes this MHSA Technological Needs project**

- ☐ New system
☐ Increases the number of users of an existing system
☐ Extends the functionality of an existing system
☐ Supports goal of modernization/transformation
☒ Supports goal of client and family empowerment

Indicate the type of MHSA Technological Needs Project

Electronic Health Record (EHR) system projects (check all that apply). If the project includes an EHR or PHR, please follow the standards found in Appendix B of Enclosure 3 located at: Not Applicable

http://www.dmh.ca.gov/Prop_63/MHSA/Technology/forms/Published/TemplatesUserFriendly_Enc3_AppB_FILLABLE.pdf

- ☐ Infrastructure, security, and privacy
☐ Practice Management
☐ Clinical Data Management
☐ Computerized Provider Order Entry
☐ Full Electronic Health Record (EHR) with interoperability components (Example: Standard data exchanges with other counties, contract providers, labs or pharmacies)

Client and family empowerment projects

- ☒ Client/Family access to computing resources projects
☐ Personal Health Record (PHR) system projects
☐ Online information resource projects (expansion/leveraging information-sharing services)

Other technological needs projects that support MHSA operations

- ☐ Telemedicine and other rural/underserved service access methods
☐ Pilot projects to monitor new programs and service outcome Improvement
☐ Data Warehousing projects/decision support
☐ Imaging/Paper conversion projects
☐ Other

Indicate the Technological Needs project implementation approach

- ☐ Custom application: Name of Consultant or Vendor (If applicable) _____
☒ Commercial Off-The-Shelf (COTS) System: Name of Vendor _____ To be selected
☒ Product Installation: Name of Consultant and/or Vendor (If Applicable) _____ To be selected
☒ Software Installation: Name of Vendor _____ To be selected

Technological Needs New Project Description**1. Provide a summary of the TN Project:**

San Diego County Mental Health Services (SDCMHS) plans to use MHSA Technological Needs resources to provide tools for secure client and family access to health information that is culturally and linguistically competent within a wide variety of public and private settings. The Mental Health Services planning process has used an extensive series of surveys (Attachment #1) and a series of regional community forums (discussed below) to establish the best strategies to accomplish the goal to make technology tools more accessible to consumers and families.

Building directly from our survey results and community forums, we have established several areas of development. We plan to expand consumer access to appropriate hardware, software and training. Consumer and stakeholder meets have established the need to make technology available across the county in all regions and serving the requirements of consumers in age appropriate and culturally relevant settings. We plan a consumer and family technology project that is driven by our planning process.

This project summary outlines areas that are being considered for future deployment. However, it is vital to note that we

fully anticipate both new technology and new stakeholder input will inform the deployment of technology in service to consumers and families.

SDCMHS intends primarily to outsource the delivery of technology and training services. Through the Request for Proposal process, SDCMHS will select one or more Consumer Technology Providers who can deliver technology to one or more of our regions and age groups. Additionally, we may wish to enter in to a memorandum of understanding (MOU) with one or more county agencies who are similarly engaged in providing technology to consumers. For example, San Diego County Library has an established track record for offering technology to consumers. We may wish to partner with the library or another department such as social services or public health.

The key project elements identified by our planning process include:

Hardware - San Diego County Mental Health Services will select one or more Consumer Technology Providers to install and continuously maintain a variety of hardware for use by consumers and family members. The hardware will be monitored, maintained and kept virus free. All workstations established by this project will include software designed to maintain safe and secure workstations in a public environment.

- H1. Expand and upgrade current workstations available for consumer and family use.
- H2. A pilot project may be conducted to loan technology to consumers who require improved communication with providers, case managers and medical support.
- H3. Technology upgrades for selected conference rooms used for community meetings.

Software – Commercial off the shelf (COTS) products will be made available to consumers in varied settings. The selected Consumer Technology Providers will install and maintain software products that may include:

- S1. Standard software such as the Microsoft Office suite of products.
- S2. Educational software.
- S3. Software to support the operations of consumer/family clubhouses.
- S4. Assistive software for those with disabilities.
- S5. Software to assist consumers and families to support learning about:
 - Life skills management
 - Employment readiness
 - Exercise
 - Health and nutrition
 - Recovery and wellness
 - Vocational/arts training leading to employment
 - GED preparation
 - Preparation for interactions with health care provider

Training - Training programs designed for consumer and family participants is an essential element of the Empowerment project. The selected provider will provide training programs which may include:

- T1. Face to face computer training on software such as Word and Excel.
- T2. Computer basics.
- T3. Learning how to navigate the web with a browser.
- T4. Learning how to identify trustworthy web sites, avoid scams.
- T5. Using video equipment to help train persons for job interviews and other social situations.
- T6. How to use social networking to communicate with family and support groups.
- T7. Resume development.
- T8. Certified Peer Specialist training for help-desk support for consumers and family.

Appropriate Settings – The selected provider(s) will deploy hardware, software and technology training programs throughout San Diego County regions. A key element of this deployment may be using existing space in County Libraries which are currently accessible to consumers and families. Appropriate kiosks in settings at consumer technology access points such as:

- County of San Diego funded consumer and family clubhouses.
- County Libraries.

- Senior and community centers.
- Clinics or other mental health programs
- Board and Care and other community living settings.

Consumer Technology Conference - This project will include two Consumer/Family Technology conferences which will provide information to consumers about how they can best use computer technology to promote health, resilience, wellness and recovery.

2. Describe how this project is critical for accomplishing the County's and Department's MHSA goals and objectives.

The Consumer/Family Access to Computer Resources Project is intended to: 1) promote client/family growth and autonomy by increasing access to computer resources and health information; 2) provide basic computer skills training to clients allowing them to effectively utilize the computer resources made available to them; and 3) provide appropriate access to technical assistance resources when needed.

The proposed project will support local MHSA programs in the following ways:

- Provide clients with access to computer resources and tools that can be used to foster more informed interactions with their providers and support more client-driven service delivery.
- Provide clients and their families with knowledge and tools which will help with greater engagement and participation in their local communities by accessing increasingly common tools of communication.
- Provide clients and their families with access to information and other online resources that will promote wellness, recovery, and resiliency.
- Computer skills training will support the acquisition of skills that will promote the well-being of clients by increasing their capacity to make use of the computer resources made available to them and provide greater opportunities for gainful employment.

3. Describe how the proposed technology of this project can be integrated with existing systems to achieve the Integrated Information Systems Infrastructure (IISI).

Computers and peripheral devices dedicated for consumer/family use will not be connected to the SDMHS computer network. Consequently integration management with the IISI will not be required at this time.

4. List the inventory of new software, hardware, and licenses to be purchased for this project.

SDCMHS received considerable input from stakeholders regarding the software programs that would be the most useful for clients/family. A defined list of products is pre-mature for this project and would be based on proposals submitted as a result of a competitive procurement process and the software, hardware and pricing available at that time.

Stakeholders strongly recommended basic computer software packages such as Microsoft Office® that will allow users to perform word-processing, spreadsheet development, and slide presentations. Stakeholders also recommended learning resource software such as basic computer skills.

5. Attach a detailed project plan for this project.

Anticipated Start Date: [7/1/2011] Anticipated End Date: [1/31/2013]

See attached timelines that follow this project plan.

6. Have you completed a detailed Work Flow Analysis of the current system? If yes, please provide a brief summary of the current system's workflow. If no, please explain why one has not been completed and when you intend on completing it.

Not Applicable

7. If this project's scope and/or funding deviates from the information presented in the County's approved Component Proposal, describe the stakeholder involvement and support for the deviation.

The Consumer/Family Empowerment project is in total compliance with the approved Component Proposal which states: *“Consumer and Family Empowerment Project – This is a project to provide consumer and families with improved access to computer technology, tool and resources, allowing individuals to manage their personal health information and make more informed decisions. “*

8. If this project is an EHR related project, checkmark all components in the Major Milestones for this project.
Not Applicable

Needs Assessment and Vendor Selection

- ☐ Needs Assessment
- ☐ Vendor Selection Process

Infrastructure

An interoperable EHR requires a secure network structure for sharing information

- ☐ Infrastructure

Practice Management (Web-Based Vendor)

Formulates the criteria needed to provide critical support for practice management functions to increase productivity, improve financial performance, financial management, and compliance programs.

- ☐ Electronic Registration
- ☐ Electronic Scheduling
- ☐ Billing Interface with State
- ☐ Billing Interface with Contract Providers

Clinical Data Management (EHR “Lite” Clinical Notes and History)

Clinical documentation such as assessment; treatment notes; and other clinical measures, which includes data elements and corresponding definitions that can be used in the measurement of patient clinical management and outcomes, and for research and assessment.

- ☐ Assessment and Treatment Plan
- ☐ Document Imaging
- ☐ Clinical Notes Module

Computerized Provider Order Entry (CPOE) - (Ordering and Viewing / E-Prescribing and Lab)

Optimizing physician ordering of medications, laboratory tests with interactive decision support system.

- ☐ Lab - Internal
- ☐ Lab - External
- ☐ Pharmacy - Internal
- ☐ Pharmacy – External
- ☐ Lab and Pharmacy - Both

Interoperability Components (Data Transfer - Connectivity and Language Standards)

The ability of the system to transfer data outside the County clinic.

- ☐ Messaging – Data transfer between different systems with different data standards.
- ☐ Record Exchange – Data transfer between two systems that share a common structural design.
- ☐ Messaging and Record Exchange – Both

Fully Integrated EHR and PHR

Full EHR and PHR: Full EHR functionality and interoperability with a Personal Health Record system.

- ☐ Fully Integrated EHR and PHR

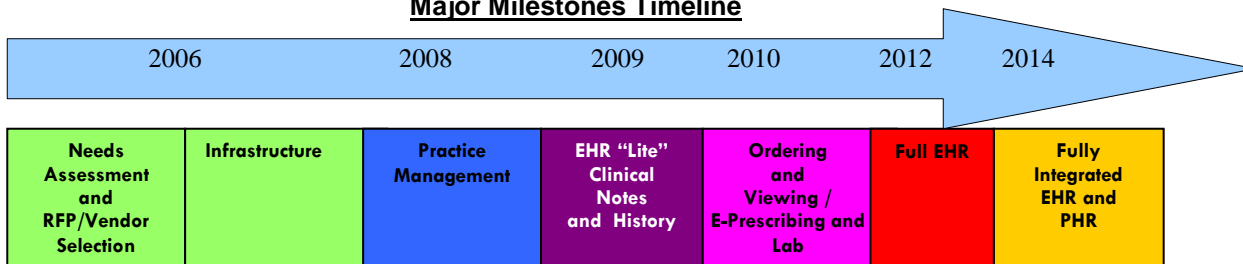
Other

☐ Other:

9. If this is your first project work plan submission for an EHR related project or if your major milestones timeline has changed since your last submission, complete a proposed implementation timeline with the following major milestones:

Note: This project does not alter the San Diego County Timeline as originally submitted.

Major Milestones Timeline



10. Assess the Project's risk rating using the following Project Risk Assessment.

Project Risk Assessment					
Category		Factor	Rating	Score	
Estimated Cost of Project		Over \$5 million	6	6	
		Over \$3 million	4		
		Over \$500,000	2		
		Under \$500,000	1		
Project Manager Experience					
Like Projects completed in a “Key Staff” Role		None	3		
		One	2		
		Two or More	1	1	
Team Experience					
Like Projects Completed by at least 75% of Key Staff		None	3		
		One	2		
		Two or More	1	1	
Elements of Project Type					
Hardware	New Install	Local Desktop/Server	1	1	
		Distributed/Enterprise Server	3		
	Update/Upgrade	Local Desktop/Server	1	1	
		Distributed/Enterprise Server	2		
	Infrastructure	Local Network/Cabling	1		
		Distributed Network	2		
		Data Center/Network Operations Center	3		
Software	Custom Development		5		
	Application Service Provider		1		
	COTS* Installation	”Off-the-Shelf”	1	1	
		Modified COTS	3		
	Number of users	Over 1,000	5	5	
		Over 100	3		
		Over 20	2		
		Under 20	1		
	*Commercial Off-The-Shelf Software	Architecture	Browser/Thin Client based	1	1
			Two-Tier (Client / Server)	2	
		Multi-Tier (Client & Web, Database, Application, etc., Servers)	3		

Total Score	Project Risk Rating
<input type="checkbox"/> 25 - 31	High
<input checked="" type="checkbox"/> 16 - 24	Medium
<input type="checkbox"/> 8 - 15	Low

11. If this is your first project work plan submission or if any information in the County's personnel analysis has changed since your last submission, complete a new County Personnel Analysis (management and staff) below.

No change required from previous submission.

Major Information Technology Positions	Estimated # FTE Authorized	Position hard to fill? 1 = Yes 0 = No	# FTE Estimated to meet need in addition to # FTE authorized
(1)	(2)	(3)	(4)
A. Information Technology Staff (direct service):			
Chief Technology/Information Officer			
Hardware Specialist			
Software Specialist			
Other Technology Staff			
Subtotal A			
B. Project Managerial and Supervisory:			
CEO or manager above direct supervisor			
Supervising Project Manager			
Project Coordinator			
Other Project Leads			
Subtotal B			
C. Technology Support Staff:			
Analysts, tech support, and quality assurance			
Education and training			
Clerical, secretary, and administrative assistants			
Other support staff (non-direct services)			
Subtotal C			
TOTAL COUNTY TECHNOLOGY WORKFORCE:			
Total (A +B+C)			

12. If this is your first project work plan submission for an EHR related project or if any information in your vendor selection criteria has changed since your last submission, describe your criteria for selecting an EHR vendor (such as RFP).

Not applicable

13. Do you certify that all County, State, and Federal guidelines for ensuring the privacy and security of client data will be met? Yes [x] No []

TECHNOLOGICAL NEEDS EXISTING PROJECT

Please provide the following information when requesting additional funds for existing projects only:

1. Provide a brief summary of the TN project and its current status:

Not applicable.

2. Provide a justification how this request is a continuation of a previously approved project and not a new project.

3. Why was the initial funding insufficient? Check all boxes that apply and provide an explanation of each

- | | |
|---|--|
| <ul style="list-style-type: none"> a. <input type="checkbox"/> Project manager performance b. <input type="checkbox"/> Project staffing c. <input type="checkbox"/> Requirements not completely defined d. <input type="checkbox"/> Change in scope e. <input type="checkbox"/> Difficulties in customizing COTS f. <input type="checkbox"/> Delay in project start date g. <input type="checkbox"/> Completion date has lapsed h. <input type="checkbox"/> Change in Vendor/contract services cost | <ul style="list-style-type: none"> i. <input type="checkbox"/> Change in cost of materials (hardware, software, etc.) j. <input type="checkbox"/> Personnel cost increase k. <input type="checkbox"/> Delay in RFP process l. <input type="checkbox"/> Insufficient management support m. <input type="checkbox"/> Training issues n. <input type="checkbox"/> Other |
|---|--|

Explanation:

4. How will the additional funds be used? Check all boxes that apply and provide an explanation of each.

- | | |
|---|--|
| <ul style="list-style-type: none"> a. <input type="checkbox"/> Hire additional staff or other personnel b. <input type="checkbox"/> Acquire new contract services (vendors) c. <input type="checkbox"/> Expand existing contract scope of work d. <input type="checkbox"/> Acquire new hardware (provide list below) e. <input type="checkbox"/> Expand existing infrastructure f. <input type="checkbox"/> Acquire new software (provide list below) | <ul style="list-style-type: none"> g. <input type="checkbox"/> Expand existing software h. <input type="checkbox"/> Acquire other materials i. <input type="checkbox"/> Training costs j. <input type="checkbox"/> Other |
|---|--|

Explanation:

5. Which sections, if any, of your original project are being changed or updated? Check all boxes that apply and provide an explanation of each.

- | | |
|---|---|
| <ul style="list-style-type: none"> a. <input type="checkbox"/> Project organization b. <input type="checkbox"/> Project management resources c. <input type="checkbox"/> Support resources d. <input type="checkbox"/> Development and maintenance resources e. <input type="checkbox"/> Quality assurance testing resources f. <input type="checkbox"/> Project plan dates (schedule) g. <input type="checkbox"/> Project scope h. <input type="checkbox"/> Project roles and responsibilities i. <input type="checkbox"/> Project monitoring and oversight | <ul style="list-style-type: none"> j. <input type="checkbox"/> Project phasing k. <input type="checkbox"/> Change management plan l. <input type="checkbox"/> Risk management plan m. <input type="checkbox"/> Contract services costs n. <input type="checkbox"/> Hardware costs o. <input type="checkbox"/> Software costs p. <input type="checkbox"/> Personnel costs q. <input type="checkbox"/> Other costs r. <input type="checkbox"/> Training provisions s. <input type="checkbox"/> None |
|---|---|

Explanation:

6. Explain how the stakeholders were provided an opportunity to participate in the decision.

This Technological Needs project is consistent with and supportive of the vision, values, mission, goals, objectives and proposed actions of the MHSA Capital Facilities and Technological Needs Component Proposal and is consistent with the County Major Milestones Timeline for moving towards an Integrated Information Systems Infrastructure, as described in the County Technological Needs Description.

All documents in the funding request are true and correct.

Jerald Coleman
Chief Information Officer (Print)

David Nelson
HIPAA Privacy/Security Officer (Print)

Signature Date 2/9/11

Signature Date 2/8/11